



**PROVISION OF INSURANCE SERVICES TO  
THE RTMC FOR A PERIOD OF NINE (9)  
MONTHS WITH AN OPTION TO EXTEND  
FOR THREE (3) MONTHS**

**RTMC BID NO:22/2018/19**

## SECTION: 1

# **CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID**

## CONDITIONS AND UNDERTAKINGS BY BIDDER IN RESPECT OF THIS BID

### 1. **Proprietary Information**

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Road Traffic Management Corporation (RTMC) considers this bid and all related information, either written or verbal, which is provided to the bidder, to be proprietary to RTMC. It shall be kept confidential by the bidder and its officers, employees, agents and representatives. The bidder shall not disclose, publish, or advertise this specification or related information to any third party without the prior written consent of RTMC.

### 2. **Enquiries**

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- 2.1 All communication and attempts to solicit information of any kind relative to this bid should be channeled to the email below, however such enquiries will be entertained until within ten days of publication on tender bulletin and National Treasury tender portal

Name	RTMC
Email Address	<a href="mailto:Bidadmin@rtmc.co.za">Bidadmin@rtmc.co.za</a>

- 2.2 All the documentation submitted in response to this bid must be in English.
- 2.3 The RTMC may respond to any enquiry in its sole discretion and the bidder acknowledges that it will have no claim against the RTMC on the basis that its bid was disadvantaged by lack of information, or inability to resolve ambiguities.

### 3. **Validity Period**

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Responses to this bid received from bidders will be valid for a period of **120 days** counted from the closing date of the bid.

### 4. **Supplier Performance Management**

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- 4.1 Supplier Performance Management is viewed by the RTMC as critical component in ensuring value for money acquisition and good supplier relations between the RTMC and all its suppliers.
- 4.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude a Service Level Agreement (SLA) with the RTMC, which will form an integral part of the agreement. The SLA will serve as a tool to measure, monitor and assess the supplier's performance level and ensure effective delivery of service, quality and value-add to RTMC business.

## 5. **Instructions on submission of Bids**

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- 5.1 Bids should be submitted in **Five (5) copies** (1 original and 4 copies) and one all bound in a sealed envelope endorsed, **RTMC BID 22/2018/19: provision of insurance services to the rtmc for a period of nine (9) months with an option to extend for three (3) months.**
- 5.2 The sealed envelope must be placed in the bid box at the Main Reception area of the RTMC **Eco Origin, Block F, 349 Witch-Hazel Street, Erf 3090, Highveld, Centurion Ext 79, 0157** by no later than **11:00 am on 18 March 2019.**
- 5.3 **Compulsory briefing session will be held on the 28 February 2019 at 10h00am. Venue: Eco Origin, Block F, 349 Witch-Hazel Street, Erf 3090, Highveld, Centurion Ext 79, 0157**
- 5.4 The bidder's company name, closing date and the return address must also be endorsed on the envelope.
- 5.5 All bids submitted must be signed by a person or persons duly authorised thereto.
- 5.6 If a courier service company is being used for delivery of the bid document, the bid description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered into the bid box. The RTMC will not be held responsible for any delays where documents are not placed in the bid box before closing time.
- 5.7 Bid received by telegram, telex, email, facsimile or similar medium will not be considered.
- 5.8 Where a bid document is not placed in the bid box at the time of the bid closing, such a bid document will be regarded as a late bid. **Late bids will not be considered.**
- 5.9 Amended bids may be sent in an envelope marked "**Amendment to Bid**" and should be placed in the bid box before the closing time.
- 5.10 Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by RTMC in regard to anything arising from the fact that pages are missing or duplicated.

## **6. Undertakings by the Bidder**

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- 6.1 The bidder accepts that all costs incurred in preparation, presentation and any demonstration in relation to this bid shall be for the account of the bidder.
- 6.2 The bidder hereby offer to render all or any of the services described in the attached documents to the RTMC on the terms and conditions and in accordance with the specifications stipulated in this bid documents (and which shall be taken as part of, and incorporated into, this proposal at the prices inserted therein).
- 6.3 The bidder shall prepare for a possible presentation should RTMC require such and the bidder shall be notified thereof no later than 4 (four) days before the actual presentation date. Such presentation may include demonstration of products or services as called for by the RTMC in relation to this bid.
- 6.4 The successful bidder hereby accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under this agreement as the principal(s) liable for the due fulfilment of this contract.
- 6.5 The bidder furthermore confirm that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents and that the price(s) and rate(s) cover all his/her obligations under a resulting contract and that he/she accept that any mistakes regarding price(s) and calculations will be at his/her risk

## **7. RTMC's Rights**

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- 7.1 The RTMC reserves the right not to accept the lowest bid or any bid in part or in whole. RTMC normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is technically acceptable and/or financially advantageous to the RTMC.
- 7.2 The RTMC also reserves the right to award this bid as a whole or in part without furnishing reasons.
- 7.3 The RTMC reserves the right to conduct a site visit at the premises of the offices or at any client sites if so required.

- 7.4 The RTMC reserves a right to amend any bid conditions, validity period, specifications, or extend the closing date of bid prior to the initially stated closing date. Bidders will be advised in writing of such amendments in good time.
- 7.5 The RTMC reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the RTMC to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

## **8. Supplier Development and Promotion of Emerging Black Owned Service Provider**

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- 8.1 The RTMC promotes enterprise development In this regard, successful bidders are encouraged to mentor SMME's and/or Youth owned businesses. The implications of such arrangement will be be subject to negotiations between the RTMC and the successful bidder.
- 8.2 It is also the objective of the RTMC to promote transformation of the South African economy and as such, bidders are encouraged to partner with a black owned entity (being 50%+1 black owned and controlled). Such partnership may include the formation of a Joint Venture and/ or subcontracting agreement etc., where a portion of the work under this bid would be undertaken by black owned entities.
- 8.3 To give effect to this requirement, bidders are required to submit a partnership/ subcontracting proposal detailing the portion of work to be outsourced, level of involvement of the black owned partner and where relevant, submit a consolidated B-BBEE scorecard in-line with the provisions of the PPPFA Regulations which will be considered as part of the B-BBEE scoring.

9. **Bidders Details and Contact Person**

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<b>DETAILS OF BIDDERS</b>			
<b>Name of your Company</b> (in block letters)			
<b>Signature(s) of the Bidder</b> <b>or assignee(s)</b>		<b>Date</b>	
<b>Name of person signing</b> (in block letters)			
<b>Capacity</b>			
<b>Are you duly authorized to</b> <b>sign this Bid?</b>			
<b>Company Registration</b> <b>Number</b>			
<b>VAT Registration Number</b>			
<b>Postal address</b> (in block letters)			
<b>Physical address</b> (in block letters)			
<b>Domicilium citandi et executandi in the RSA (full street address) (in block letters)</b>			

<b>DETAILS OF THE CONTACT PERSON</b>	
<b>Name of Contact</b> <b>Person</b>	
<b>Telephone Number</b>	

<b>Fax Number</b>	
<b>Cellphone Number</b>	
<b>E-Mail Address</b>	

## 10. **RESPONSE FORMAT**

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Bidders shall submit their responses in accordance with the response format specified below (each schedule must be clearly marked):

### 10.1 **Cover Page:**

10.1.1 The cover page must clearly indicate the bid reference number, bid description and the bidder's name

10.1.2 **Annexure 1** Invitation to Bid (SBD 1 - duly completed and signed)

### 10.2 **Schedule 1:**

10.2.1 Executive summary of the bidder's Company/Joint Venture/Partnership/Close Corporation. (Agreements/ supporting documentation must be attached and any amendments post award should be approved by RTMC)

10.2.2 **Annexure 2** of this bid document (Duly completed and Signed)

### 10.3 **Schedule 2:**

10.3.1 Certified copies of your CIPC company registration documents listing all members with percentages, in case of a CC. Or latest certified copies of all share certificates in case of a company;

10.3.2 B-BBEE Certificate verified by a SANAS accredited verification agency or a letter from the supplier's auditor. In case where a Joint Venture/Consortium is formed a combined B-BBEE Certificate must be provided.

10.3.3 **Annexure 4** Declaration of Interest (SDB 4)

10.3.4 **Annexure 5** Declaration of Bidders Past SCM Practices (SBD 8)

10.3.5 **Annexure 6** Certificate of Independent Bid Determination (SBD 9)

10.3.6 **Annexure 7** Joint Venture/Consortium Agreement (In case of Consortium or Joint Venture)



**Note: Where bidders form a Consortium or a Joint Venture, bidders must submit all documents as listed under Schedule 2 above for each party to the Consortium or Joint Venture.**

#### **10.4 Schedule 3: ( Envelope 2)**

10.4.1 Responses to **Section Two** of this document, in line with the format indicated in this bid document.

#### **10.5 Schedule 4:**

10.5.1 A detailed pricing schedule breakdown for the bid including any supporting schedules on price determination. **The price schedule must be submitted on a separate sealed envelope. Failure to comply will result in disqualification of the bid**

10.5.2 **Annexure 7** Price Schedule Summary (SBD 3.3)

10.5.3 **Annexure 8** Preferential Point Claim (SBD 6.1) and B-BBEE Certificate

### **11. SPECIAL INSTRUCTIONS TO BIDDERS**

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**11.1** Bidders shall provide full and accurate answers to the questions posed in this document.

**11.2** Bidders **must** substantiate their response to all questions, including full details on how their proposal/solution will address specific functional/technical requirements. All documents as indicated must be supplied as part of the bid response.

**11.3** RTMC reserves the right to appoint more than one service provider in order to ensure prompt delivery and efficiency of the service.

### **12. EVALUATION CRITERIA**

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The bid will be evaluated on a three-stage process

#### **(a) Stage 1 – Mandatory requirements**

Bidders who fail to meet the mandatory requirements will be disqualified from further evaluation.

#### **(b) Stage 2 – Functionality Evaluation**

A two step process will be used which comprises of written responses/ proposals and presentation.

Step 1 will be on written responses/proposals which consists of **50 points**.

**NB:** Bidders will be required to score a minimum of **30 points** in order to qualify for Step 2 .

Step 2 will be based on presentation which consists of **50 points**.

Bidders will be required to make a presentation before the evaluation committee, however at least a minimum of **40 points** must be scored during the presentation.

**NB :** Bidders will finally be required to score at least **65 points** on functional evaluation in order to qualify for stage 3.

**(c) Stage 3 – Price and Preference Points Evaluation**

Stage 3 will be evaluated on a 80/20 Preference Point System (i.e. 80 points on Price and 20 points on B-BBEE).

**12.1 STAGE 1 – MANDATORY REQUIREMENTS**

**NOTE: A BIDDER WHO FAILS TO MEET THE ABOVE MANDATORY REQUIREMENT WILL BE DISQUALIFIED FROM FURTHER EVALUATION**

<b>MANDATORY REQUIREMENT (1)</b>	<b>Comply (Yes / No)</b>
<p><b>Compliance Certificate</b></p> <p>The service providers/bidders should be compliant with the <b>Insurance Act No 18 of 2017</b> and legislations listed by the Financial Service Board (FSB).</p> <p><b>Compliance Requirement</b></p> <p>Bidder to attach FSB compliance certificate</p>	
<p>The service providers/bidders should be compliant with the <b>Financial Advisory and Intermediary Services Act No 37 of 2002</b></p> <p><b>Compliance Requirement</b></p> <p>Team leader/ Responsible executive / Account manager to submit Regulatory Exam ( RE5) certificate</p>	

<p>Bidders must be registered on National Treasury Central Supplier Data base (CSD)</p> <p>Registration on CSD (available on <a href="http://www.csd.gov.za">www.csd.gov.za</a>)</p> <p>Tumelo Ntlaba - 012 406 9222</p> <p>Email: <a href="mailto:CSD@Treasury.gov.za">CSD@Treasury.gov.za</a></p> <p>Requirement: CSD report or reference number</p>	
<p>Bidders must complete and sign all SBD bidding forms attached.</p> <p><b>Requirement:</b> submission of all completed and signed SBD forms</p>	

## 12.2 STAGE 2 – FUNCTIONALITY CRITERIA

Step 1 will be based on written proposals and shall be evaluated based on the following parameters for functionality:

Requirements	Score
<b>A. Company profile /risk assessment</b>	<b>5</b>
<p><b>The bidder is expected to give an overview of sector specific experience in relation to Insurance</b></p> <ul style="list-style-type: none"> <li><b>Company profile reflecting the following;</b> <ul style="list-style-type: none"> <li>✓ Years of experience in relation to Insurance <ul style="list-style-type: none"> <li>5 years experience or more = 5 points</li> <li>3 to 4 years experience = 3 points</li> <li>1 to 2 years experience = 2 points</li> </ul> </li> </ul> </li> </ul> <p><b>Requirement:</b></p> <p>Company profile detailing the above</p>	
<b>B. References of Similar Work Done</b>	<b>20</b>
<p><b>B1 The bidder must provide a references of similar work done (Insurance services).</b></p> <ul style="list-style-type: none"> <li>1 to 2 references = <b>15 points</b></li> <li>3 or more references = <b>20 points</b></li> </ul> <p><b>Requirements:</b></p> <p>Bidders are expected to attach copies of reference letters from their previous</p>	

<p>Organisations/entities where they rendered similar service. The following details must be reflected in the content of the reference letter/s:-</p> <ul style="list-style-type: none"> <li>• Name and short description of project successfully completed/involved in</li> <li>• Role and Responsibilities,</li> <li>• Duration of involvement (in months),</li> <li>• Value of the contract,</li> <li>• Contactable References. (letter of references in letterhead of the clients signed by authorized persons</li> </ul>	
<p><b>C. Ability of the bidder's infrastructure to handle and settle claims</b></p>	<p><b>20</b></p>
<p>Availability of systems, personnel, support network, ie</p> <ul style="list-style-type: none"> <li>• Personnel ( Expertise and knowledge to perform below listed) = 10 points <ul style="list-style-type: none"> <li>➤ Training programme (induction, refresher programmes) = 5 points</li> <li>➤ Ability to analyze RTMC profile and advise accordingly = 5 points</li> </ul> </li> <li>• Systems and processes ( Claims) = 10 points <ul style="list-style-type: none"> <li>➤ Illustration/ step by step of handling of queries = 4 points</li> <li>➤ Claims administration = 3 points</li> <li>➤ Response turn around times = 3 points</li> </ul> </li> </ul> <p>The bidder will be required to assist in the claim's management process from submission to finalisation and reporting. Claims must be processed on timeously . All claims lodged must be supported by all the relevant documentation to ensure efficient settlement. The bidder must ensure that the contractual rights of the RTMC in terms of the insurance policy are protected and enforced</p> <p>Bidder is expected to give an indication/ narrative as to how the above stated issues will be handled in relation to the elements listed above.</p> <p>The following measurers to be used;</p> <ul style="list-style-type: none"> <li>5 - Excellent Meets and exceeds the functionality requirements</li> <li>4 - Very Good Above average compliance to the requirements</li> <li>3 - Good Satisfactory and should be adequate for stated element</li> <li>2 - Average Compliance to the requirements</li> <li>0 - Non Compliant Does not comply to the requirements</li> </ul>	

<b>D. Financial Due Diligence</b>	<b>5</b>
<p>D1 The bidder must submit a confirmation letter that indicates that they have a Professional Idemnity insurance (PI cover).</p> <p>Compliance requirement;</p> <p>Bidder to submit a letter of confirmation that the company will have PI cover .</p>	5
<b>Total</b>	<b>50</b>

## Step 2 PRESENTATIONS

<b>E. Knowledge Of The Subject Matter</b>	<b>50</b>
<ol style="list-style-type: none"> <li>1. Outline summary displaying extensive knowledge and experience in the provision of a insurance services = 10 points</li> <li>2. Outline and give a high level overview of all items listed below; <ul style="list-style-type: none"> <li>• <b>Legal support</b> = 5 points <ul style="list-style-type: none"> <li>Details of support that will be given to RTMC in respect of claims rejected etc</li> </ul> </li> <li>• <b>Reporting</b> = 10 points <ul style="list-style-type: none"> <li>Bidder must be able to provide details of the following reports: <ul style="list-style-type: none"> <li>➤ Reconciliation of all claims data.</li> <li>➤ Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.</li> <li>➤ Performance Report recording any failures to achieve service levels, the cause of the failures and a summary of steps taken to resolve the failures and avoid them in the future.</li> </ul> </li> </ul> </li> <li>• <b>Any Value add services</b> = 10 points <ul style="list-style-type: none"> <li>➤ Bidder to outline any value add services over and above what is referred to in scope of work = 5 points</li> <li>➤ On-going evaluation of uninsured risks and possible options for addressing them = 5 points</li> </ul> </li> </ul> </li> </ol>	

- **Transition plan = 5 points**
  - Transition plan which sets out how it will take over the services from the previous service providers and how it will set-up its service delivery capability to deliver the services without interruption of service
  - Assist with the handover to a new service provider at the expiration or earlier termination of the Agreement.
- **Monitoring and performance management- 10 points**
  - Dedicated resource to monitor the contract and advise accordingly about new trends, risks etc

The following measurers to be used;

- 5 - Excellent Meets and exceeds the functionality requirements
- 4 - Very Good Above average compliance to the requirements
- 3 - Good Satisfactory and should be adequate for stated element
- 2 - Average Compliance to the requirements
- 0 - Non Compliant Does not comply to the requirements

**NB: This area must be incorporated in the bid response as part of functionality. The service provider will be invited to present this in a form of Power point once they have qualified to this step.**

<b>STEP TWO SUB TOTAL</b>	<b>50</b>
<b>OVERALL TOTAL FOR FUNCTIONALITY</b>	<b>100</b>

**NOTE: THE MINIMUM QUALIFYING SCORE FOR OVERALL FUNCTIONAL EVALUATION IS 65 POINTS. ALL BIDDERS THAT FAIL TO ACHIEVE THE MINIMUM QUALIFYING SCORE ON FUNCTIONALITY WILL NOT BE CONSIDERED FOR FURTHER EVALUATION ON PRICE AND B-BBEE.**

Functionality will be evaluated at the following scales:

VALUE	DESCRIPTION
5- Excellent	Meets and exceeds the functionality requirements
4- Very Good	Above average compliance to the requirements
3- Good	Satisfactory and should be adequate for stated element
2- Average	Compliance to the requirements
0- Non Compliant	Does not comply to the requirements

### 12.3 STAGE THREE – PRICE AND B-BBEE (PREFERENCE POINTS EVALUATION)

CRITERIA	MAXIMUM POINTS
Price	80
B-BBEE Rating	20
<b>Grand Total</b>	<b>100</b>

## **SECTION: 2**

# **SPECIFICATION DETAILS AND FUNCTIONALITY REQUIREMENTS**



## **SECTION 2: TECHNICAL REQUIREMENTS/ SPECIFICATION**

### **1. PURPOSE**

The purpose of the request is to invite suitably qualified insurance service providers to submit bids for rendering of insurance services to Road Traffic Management Corporation for a period of nine (9) months with an option to extend for another three (3) months

### **2. PROBLEM STATEMENT**

The Organisation has grown largely due to the section 42 transfer of functions and assets from amalgamated entities namely, RTI unit from CBRTA, Boekenhoutkloof Traffic Training College, as well as Natis assets in use nationally across all Driver's License Testing Centres (DLTCs) and Post Offices (POs).

Looking at the magnitude of the organizations assets versus the risk exposure, it is imperative that the Corporation insure its assets in order to mitigate and reduce the risk of loss that the Corporation may suffer due to threats such as theft, malicious damage, fire or floods etc.

### **3. DISCUSSION**

A self-insurance model is a preferred method that is deemed as more cost-effective insurance solution by RTMC.

The Corporation intends to acquire an incorporated insurance covering both motor and non-motor assets on the basis that the motor cover terms should serve as self-insurance and (if needed) a standard comprehensive insurance for Assets of the Corporation.

#### 4. SPECIFICATIONS / SCOPE OF WORK

##### 4.1 RISKS AREAS TO BE COVERED

ELECTRONIC EQUIPMENT/COMPUTERS	
ACCIDENTAL AND VIOLENT DAMAGE INCLUDING SUDDEN AND UNFORESEEN MECHANICAL OR ELECTRICAL FAILURE, LOSS OR THEFT.	
DESCRIPTION	VALUE
<b>1. ELECTRONIC EQUIPMENT /COMPUTERS</b>	<b>INSURED AMOUNT</b>
1.1 Scanners, printers ,servers	Asset Register to be provided
1.2 Computer equipment	
1.3 Laptops notepads, ipads	
1.4 Other related electronic equipment	

**NB: Kindly note assets are movable between regions (Take note of the location on the asset register)**

DESCRIPTION	VALUE
<b>2. MACHINERY BREAKDOWN</b>	Asset Register to be provided
<b>2.1 Generators</b>	

MOTOR FLEET	
DESCRIPTION	INSURED AMOUNT
<b>3. FLEET BREAKDOWN</b>	Asset Register to be provided
3.1 Motor vehicle	
3.2 Buses	
3.3 Trucks	
3.4 Weighbridges and testing stations	
3.5 Trailers	
3.6 Tractors	
3.7 Simulators	
<b>TOTAL MOTOR FLEET</b>	

OFFICE CONTENTS	
DESCRIPTION	INSURED AMOUNT
<b>4 OFFICE EQUIPMENT AND FURNITURE FITTINGS</b>	
4.1 Office furniture	Asset Register to be provided
4.2 Office equipment	
<b>TOTAL OFFICE CONTENTS</b>	

AMOURY	
ALL FIRE ARMS AND RELATED EQUIPMENT KEPT IN THE AMOURY	
DESCRIPTION	INSURED AMOUNT
<b>5 AMOURY</b>	
5.1 Glocks and Rifles	Asset Register to be provided

ALL BUSINESS RISK	
DESCRIPTION	INSURED AMOUNT
<b>6 COMMUNICATION DEVICES, IPADS</b>	Asset Register to be provided
6.1 Cellular phones	
6.2 Ipads	
6.3 PTTs	

DESCRIPTION	INSURED AMOUNT
<b>7 GOODS IN TRANSIT</b>	

DESCRIPTION	INSURED AMOUNT
<b>8 BUSINESS INTERRUPTION</b>	

## **4.2 ADDITIONAL INFORMATION TO BE SUPPLIED BY THE RTMC**

- 4.2.1 In order to allow bidders to respond adequately to the bid, additional information will be provided by RTMC shortly after the briefing session and a schedule will be issued to that effect.
- 4.2.2 The above exercise is aimed at ensuring uniformity in the response received from each prospective bidders and also obtain structured framework for the evaluation of proposals.

## **4.3 REPORTING**

The following reporting must be provided on intervals to be determined by RTMC.

- Reconciliation of all claims data.

Monitoring of data movements in respect of the activities on the short-term insurance portfolio and claims register.

- Performance Report recording any failures to achieve service levels, the cause of the failures and a summary of steps taken to resolve the failures and avoid them in the future.
- On-going evaluation of uninsured risks and possible options for addressing them.
- Updating the RTMC on the current state of the insurance market in terms of general economic realities, solvencies, capacity, profitability, rates and market activity and the possible impact of such matters on the RTMC's renewal strategy and insurance portfolio;
- Updating the RTMC on legal developments within the short-term insurance industry and informing the RTMC on insurance product developments in the South African market; and
- Reviewing the RTMC's short-term insurance portfolio with RTMC

## **4.3 ADVICE TO THE RTMC**

- The service provider must provide appropriate advice on the short-term insurance portfolio in the event of the RTMC requesting such advice, and assisting the RTMC with the interpretation of the insurance policy documents and matters incidental thereto, including the interpretation of the insurance rules and regulations.
- The service provider should further be able to review and advise on the short-term insurance requirements of the RTMC, have the necessary expertise and infrastructure to efficiently respond to insurance enquiries and needs of the entity.

- The service provider will be required to advise and consult with the RTMC on a renewal strategy, from time to time.

#### **4.4. ADMINISTER CLAIMS**

- The service provider will be required to assist in the claims management process from submission to finalisation and reporting. The service provider must ensure that the contractual rights of the RTMC in terms of the insurance policy are protected and enforced.
- The claims management process includes:
  - On-going management of all outstanding claims;
  - Receiving claims from the RTMC and processing them timeously;
  - Updating on progress of claims;
  - Informing the RTMC of outstanding documents on claims, if applicable ;
  - Informing the RTMC when payments are made;
  - Ensuring correct calculation and payment of benefits

#### **4.5 CLAIMS LOGGING AND TRACKING**

The service provider must be able to provide a system to the RTMC which will enable it to log and submit claims and to track the status of said claims.

#### **4.6 PERFORMANCE MEASURES**

The performance measures for the insurance service will be closely monitored by RTMC.

- Quarterly progress meetings or as and when required
- Monthly claims history or as and when required
- 30 days turn-around time on the outcome of claims .

#### **4.7 COMMUNICATION TO THE RTMC**

The service provider shall be responsible for the following on an on-going quarterly or annual basis as appropriate:

- Update the RTMC on legal developments within the short-term insurance industry and inform the RTMC on short-term insurance product developments and the risk mitigation developments in the South African market.

#### **4.8 TRANSITION**

The service provider must:

- Deliver a transition plan to the RTMC, which sets out how it will take over the services from the previous service providers and how it will set-up its service delivery capability to deliver the services, as per their agreement and
- Assist with the handover to a new service provider at the expiration or earlier termination of the Agreement.

#### **4.9 SUPPORT**

The service provider must provide

- Training programmes, materials, processes and guidelines
- One-on-one dedicated Claims Consultant

#### **4.10 VALUE ADD SERVICES**

The service provider is encouraged to propose value add services available to RTMC on an ongoing basis, share new trends in the industry and recommend any improvements thereto.

**SECTION: 3**

**ANNEXURE AND STANDARD  
BIDDING DOCUMENTS**

**See the attached SBD forms  
(All SBD forms must be signed)**

## **ANNEXURE AND STANDARD BIDDING DOCUMENTS**

<b>DOCUMENT</b>	<b>DESCRIPTION</b>
<b>BDGI</b>	<b>Bid Documents General Information</b>
<b>Annexure 1</b>	<b>Invitation to Bid (SBD 1)</b>
<b>Annexure 2</b>	<b>Acceptance of Bid Conditions and Bidder's Structure</b>
<b>Annexure 3</b>	<b>Declaration of Interest (SBD 4)</b>
<b>Annexure 4</b>	<b>Declaration of Bidder's Past Supply Chain Management Practices (SBD 8)</b>
<b>Annexure 5</b>	<b>Certificate of Independent Bid Determination (SBD 9)</b>
<b>Annexure 6</b>	<b>Pricing Schedule (SBD 3.3)</b>
<b>Annexure 7</b>	<b>Preference Points Claim Forms (SBD 6)</b>





## **BIDDING DOCUMENTS : GENERAL INFORMATION**

1. The bidding forms are drawn up so that certain essential information is to be furnished in a specific manner. Any additional particulars shall be furnished in the enclosed questionnaire(s) or in a separate annexure.
2. The bidding forms should not be retyped or redrafted but photocopies may be prepared and used. Additional offers may be made for any item, but only on a photocopy of the page in question. Additional offers made in any other manner may be disregarded.
3. Bidding forms not filled in using a computer and printer shall be completed in black ink.
4. Bidders shall check the numbers of the pages and satisfy themselves that none are missing or duplicated. No liability shall be accepted in regard to claims arising from the fact that pages are missing or duplicated.
5. The forms in respect of Preference Points Claim, if attached, shall be completed and submitted with the completed Bid.
6. Firm bid prices and delivery periods are preferred. Consequently bidders shall clearly state whether prices and delivery periods will remain firm for the duration of the contract or not.
7. If non-firm prices are submitted, this fact should be clearly stated in the bidding documents.
8. Where items are specified in detail, the specifications from an integral part of the bidding document and bidders shall indicate in the space provided whether the items offered are to specification or not.
9. In respect of the paragraphs where the items offered are strictly to specification, bidders shall insert the words "as specified".

- 10.** In cases where the items are not to specification, the deviations from the specifications shall be indicated.
- 11.** The bid prices shall be given in the units shown.
- 12.** All prices shall be quoted in South African currency.